

Minutes
JUDGES' ADVISORY COMMITTEE ON E-FILING
Bridgeport Juvenile, 1st Floor Conference Room
Tuesday September 18, 2012 - 2:00 – 4:00 PM

Those present: Hon. Patrick L. Carroll III (Chair), Hon. Barbara Bellis, and Hon. Barbara Bailey Jongbloed.

Others in attendance: Beth Bickley; Joseph D'Alesio; P.J. Deak; Lucio DeLuca; Tais Ericson; Melissa Farley; Peggy George; Dan Horwitch; David Iaccarino; Alice Mastrony; and Peter Sachs.

1. Welcome and Acceptance of Minutes from August 1, 2012 – Judge Carroll called the meeting to order at 2:01 PM and the minutes of August 1, 2012 were unanimously approved. Unfortunately, Judge Berger, Judge Lager and Judge Munro were unable to attend. For the information of the member of the public in attendance, Peter Sachs, the attendees introduced themselves.
2. Report Back: Effective Date of Changes to P.B. Sec. 10-13 – Moving up the effective date of the practice book change on electronic service was discussed with Justice Eveleigh and the vote went out but it was six or seven votes short of passage. It is going to be re-sent to the judges with a more detailed explanation as to what the contents of the packet and the procedure for returning the vote. Judge Carroll will follow up on the vote.
3. Report Back: Free Text Area on System Generated Forms – In Judge Lager's absence, Judge Bellis reported that after discussion of the issue, the Civil Commission did not recommend that anything be added to the withdrawal form.
4. Report Back: Attorney "Re-Filing" appearance to Not Accept E-Service – Judge Bellis also reported on this agenda item and the related second agenda item. The members of the Civil Commission were in favor of having the ability to change the email address or the election of service during the course of a case. Additional feedback from the Commission is discussed in #5 below.
5. Change of Election of Service / Updating & Adding Additional Email Addresses – The Commission had expressed an interest in having the ability to add additional email addresses for certification purposes. However, the rule provides for service at "an address" not at multiple addresses. To be able to enforce certification to multiple email addresses may require a rule change. If it is only an "option", someone might only send to one email address, and if an attorney is relying on the delivery to multiple email addresses, something important could be missed. The group discussed whether it would make more sense, given that electronic notices and notices of filing are being developed, to allow those who want something delivered to multiple people in a firm put an internal forwarding system in place.

This item will remain on the agenda for the next meeting.

6. Report Back: Personal Identifying Information – This item was passed and will be put on the agenda for the next meeting in order to allow Judge Berger, Judge Lager and Judge Munro, who were unable to attend, to participate in the discussion.
7. Report Back: Processing Fee Waivers – Atty. Ericson reported that a memo had been issued regarding the handling of fee waivers. The Procedures and Technical Standards were also revised to incorporate information regarding fee waivers as decided at the last meeting of the committee.
8. Report Back: Prioritizing PJR E-Filing – JIS is estimating time needed for this task when they meet later this month. P.J. Deak reported that once we have a time estimate, the committee can determine how to fit this task into the overall schedule.
9. Report Back: Clerk Electronic Signatures & Editing/Appending E-Docs – P.J. Deak reported that a committee had met and there are several components to the clerk's signatures on e-docs. The first is electronic signatures in entering orders through the JOE-Q. That piece should be in place at the end of September. The pieces still to be worked on are the ones where the clerk has to edit the document and

then send it back to the attorney. The committee has come up with some options, and now, the options will be discussed with JIS to determine which ones are most viable. Another aspect of the clerk's electronic signature relates to the JD-FM 1, a document whose layout is not controlled by the Branch. This form would possibly require the layering of clerk information over the original document. Another possibility would be for the clerk to take in the data, add the additional information that is required, and only then create the form. These options will be discussed with JIS and the committee.

10. Preparing to Move to the PDF/A Archival Standard – Beth Bickley reported that materials have been developed for posting on the web to educate filers about the standard and to recommend that they use PDF/A, although it is not mandatory. This item will remain on the agenda for the next meeting. It could impact appellate e-filing.
11. Update: Edison & E-Filing – P.J. Deak reported on recent releases since the major release in June and also on some changes to the e-filing timeline. Work is proceeding on e-filing for self-represented parties, and it is anticipated that the tasks will be completed over the next six months. The plan is to take pieces of what will be done over the next six months and set those dates, rather than trying to set dates any farther out into the future. Work is being done on electronic notices and notices of filing, two parts of family e-filing, and many other longer range projects. The slightly extended date for family e-filing will allow the development of a more forms-driven interface, which, according to David Iaccarino, will benefit the large number of self-represented parties who will be part of e-filing on family cases. Family e-filing would provide the option of the forms-based filing as a means of assisting the self-represented litigants, but it would not be required. Attorneys would be able to continue to file electronically just as they currently do on paper.

Judge Bellis reported that work is underway on evaluating the existing legend codes available in e-filing currently, with the goal of reducing the number of legend code options, ensuring that all legend codes function electronically in compliance with the rules of practice, and identifying legend codes that are only for civil, only for family or used in both. The intent of this large project is to make the system more user-friendly and provide less opportunity for making an error.

P.J. Deak pointed out that additional tasks that are going to be launched in the next few months include getting small claims cases and civil housing cases off the access databases where they currently reside, migrating other housing cases off of Forecourt, rewriting Edison, developing a program regarding the JD-FM 170, developing the program to distinguish civil and family templates, allow family to use the workflow queue and allow general access by judges to juvenile information.

He mentioned the upcoming releases which include enhancements to the attorney e-filing site, the ability to block remote access by the public to a file when jury selection is underway, a number of fixes and enhancements to the clerk's e-filing site, including the ability to print an electronic file with one click, as opposed to document by document, and certain enhancements for the judges, including the 120-day-reminder.

12. Discuss Forms-driven Process for Family (& Civil) – David Iaccarino had reported on the forms driven process, which may also be done for civil, in #11 above.
13. Report Back: Automatic Stamp on All E-Documents – P.J. Deak reported that he will be checking with the federal courts to see how the automatic stamp is handled. He will report back to the committee.
14. Party Numbers - Summons Form Modification – In the absence of Judge Quinn, who was unable to attend the meeting, P.J. Deak explained that the old summons form has party numbers that were dictated by CATER: P 1 – 49 and D 50 – 99. That numbering system is no longer in effect. In order to change the summons form, the chief court administrator would have to approve. Judge Carroll approved the numbering change on behalf of Judge Quinn. The old forms can still be used, however, since thousands of them are in the warehouse.
15. Appearing Attorneys And Sealed Case Information – P.J. Deak asked whether the additional description for motion that is sealed should be viewable. On the reclaim screen, the system shows the additional description, but on the case detail screen, the information is not viewable. After a brief discussion, the consensus was that the additional description should not be viewable.

16. Pre-6.0 – Update: Family Templates in Edison – Judge Munro was unable to attend, but P.J. Deak reported that she is aiming to have family templates by the January 2013 date when Edison will be able to separate the family templates from the civil templates. Judge Carroll observed that the templates will be of great benefit to the public and to the judges.
17. 6.0: Additional Family Issues for Discussion – Judge Munro has put together a small group to look at re-engineering the family courtroom. The group, which includes some judges and staff, will hold a preliminary meeting on October 10th. The group will be looking at ways to address the large number of documents that are currently filed in the courtroom by parties attending hearings or calendars.
18. Update: Appellate Court Access to Paperless Civil Files – Judge Carroll had nothing additional to report on this topic. The pilot case in the Appellate Court went smoothly, and the judges who accessed the paperless file found it much easier to access the record electronically than on paper.

The next meeting will be held on November 27, 2012 at 2:00 p.m. in Bridgeport.

Meeting adjourned at 2:51 p.m.